



Refresher training with CityView

Empower your staff with expert-led, customizable training—onsite or virtual

Whether you're onboarding new staff, addressing recent turnover or simply want to maximize your team's confidence using CityView, our refresher training is designed to deliver fast results. Each session offers real-world, hands-on learning guided by our in-house experts. We provide:

- Flexible delivery (onsite or virtual)
- Customizable training plans
- Courses tailored for both functional and technical users

Core training offerings

Each course includes hands-on exercises and access to CityView's test environment.

Configuration Basics: Dig into configuration essentials like lookup tables, fee maintenance, holiday setup and custom attributes. Includes hands-on practice with the Configuration Console and Workspace panel overrides.

System Administrator: Covers user management, rights and roles architecture overview, installation and upgrade procedures, plus Portal and Mobile configuration.

MS Word Add-in: Create, maintain and evolve letter templates using the Word Add-in, with best practices for formatting and automation.

Reporter: Build powerful reports using CityView Reporter for Desktop and Workspace. Learn grouping, filtering calculated fields and formatting.

WHAT OUR CUSTOMERS SAY

"My staff and I appreciated the flexibility in the training approach taken by Spencer Fisher in our session earlier this year.

"After reviewing the basic functionality of the system, he gave us the opportunity to focus on areas of the program we had less familiarity with.

"Allowing us to engage in this way has empowered us to better use the program, especially as it relates to reporting through the ad hoc query function."

- Tim Stoltzfus
Manheim Township, Penn.

"I was impressed that both trainers had familiarized themselves with our environment before the class which gave a foundation for applying the material in a practical way as we worked through the course. Thank you for a great experience!"

- Megan Loughman
City of Naples, Fla.

What to expect during training

CityView refresher training is an immersive, interactive experience designed to engage your team and deliver practical results. Here's how we structure each session:

Live instruction from a CityView product expert
Trainers bring deep product knowledge and real-world implementation experience.

Hands-on exercises in your test or training environment
Each attendee gets time to apply what they learn during the session.

Step-by-step walkthroughs of key features and processes
Designed to build understanding and reinforce best practices.

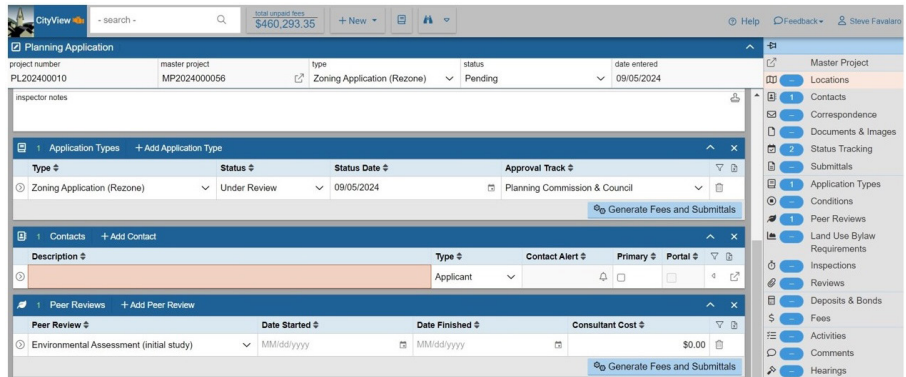
Interactive Q&A and troubleshooting opportunities
Real-time support helps ensure clarity and confidence.

Time-saving tips, pro techniques, and "good to know" insights
Each session includes advice that goes beyond the basics.

By the end of training, your staff will leave with greater confidence and actionable knowledge they can apply immediately in CityView.

Workflow: Understand and configure business processes using the Graphical Workflow Designer. Covers roles, actions, conditions and transitions.

Business Rules: Explore conditional automation using the Business Rules editor. Learn to control field behavior, enforce data entry and streamline processes.



New to Workspace? We'll walk your team through it.

Additional Options

- **Workspace Basics (4 hours)** – Ideal for new users navigating CityView Workspace
- **Custom IT Training** – Advanced sessions tailored to your tech staff
- **Module-specific training** – Eight-hour sessions for any licensed solutions, such as Permits & Inspections, Code/Bylaw Enforcement, Business Licensing and more

Ready to schedule training?

Fill out our [quick request form](#). Our team will follow up with a tailored training plan.



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